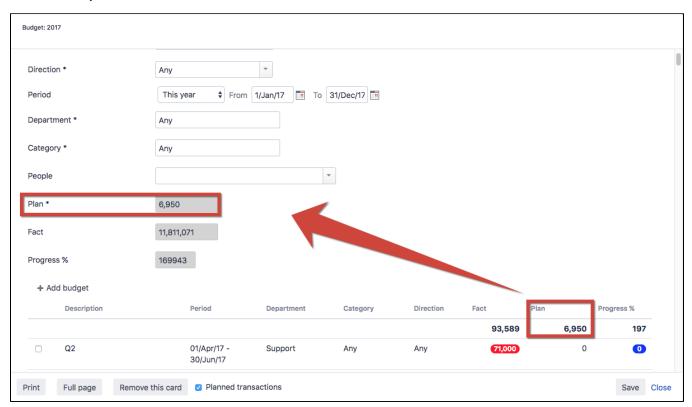
Using Budgets

Transactions let us track money when they become fact, but to compare plan with fact you need additional Budget tool.

Plan finances with Budgets feature - create planned incomes and expenses and then compare them to transactions with fact status.

The permissions are set by Jira-administrators in CRM Administrator menu / Access and configured in Setting Up Budgets.

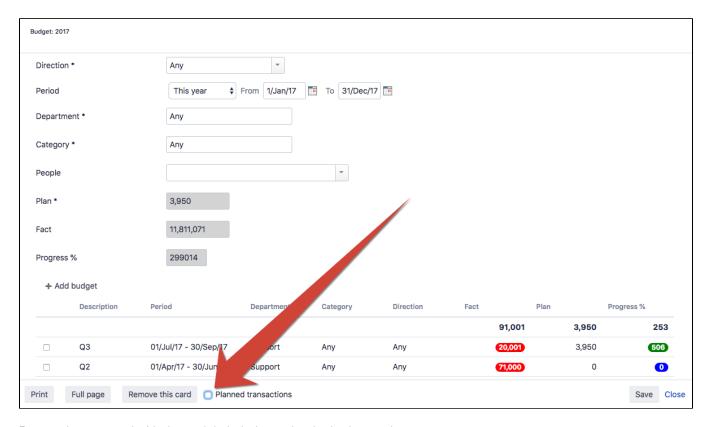
If budget has no included budgets "Plan" is filled manually. If budgets are included, then "Plan" is calculated from plans of included budgets and the field becomes read only.



Fact field is read only and is calculated automatically with transactions with "Fact" status that correspond to budgets conditions (period, direction, department etc.).

Planned transactions checkbox

You can display planned transactions in budgets to use them instead of budgets.



For example, you can make 3 budget cards in the budget card on the development department:

- salary 100 dollars
- server 20 dollars
- advertising 10 dollars

And vice versa, you can display planned transactions instead of 3 embedded cards (in case you have planned transactions).

